

# Employee Post-Travel Disclosure of Travel Expenses

RECEIVED Date/Time Stamp:

SECRETARY OF THE SENATE  
PUBLIC RECORDS

2017 NOV -2 PM 2:02

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The original Employee Pre-Travel Authorization (Form RE-1), **AND**  
☐ A copy of the Private Sponsor Travel Certification Form with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Partnership for a Secure America

Travel date(s): 10/21/2017 - 10/22/2017

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input checked="" type="checkbox"/> Actual Amount	\$35	\$90	\$77 (over two days)	\$171.64 (conference services over two days)

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

complete itinerary attached.

10/31/2017  
(Date)

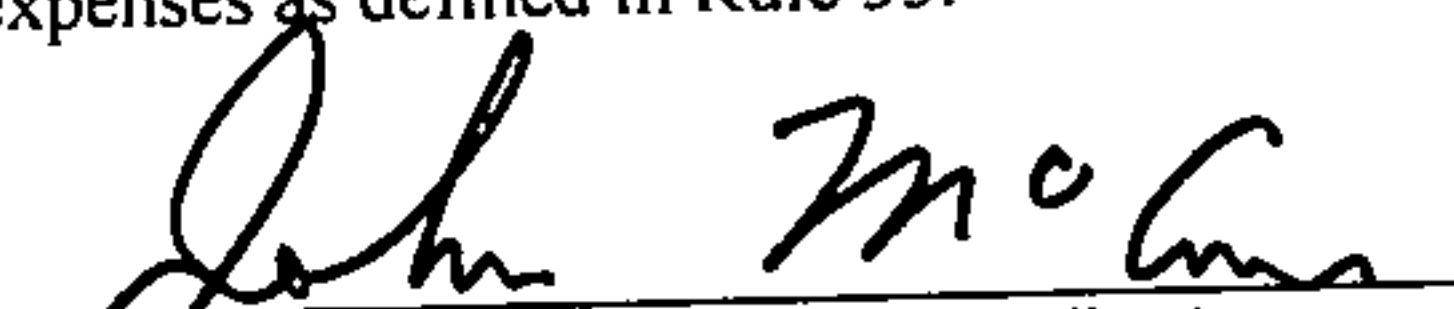
Alison Lazarus  
(Printed name of traveler)

  
(Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/31/2017  
(Date)

  
(Signature of Supervising Senator/Officer)

Form RE-2



Date/Time Stamp:

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

ETHIC SEP15'17PM 3:15

Allison Lazarus

Name of Traveler: \_\_\_\_\_

Employing Office/Committee: Senate Armed Services Committee

Private Sponsor(s) (list all): Partnership for a Secure America

Travel date(s): 10/21/2017-10/22/2017

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Destination(s): Airlie Conference Center, Warrenton, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

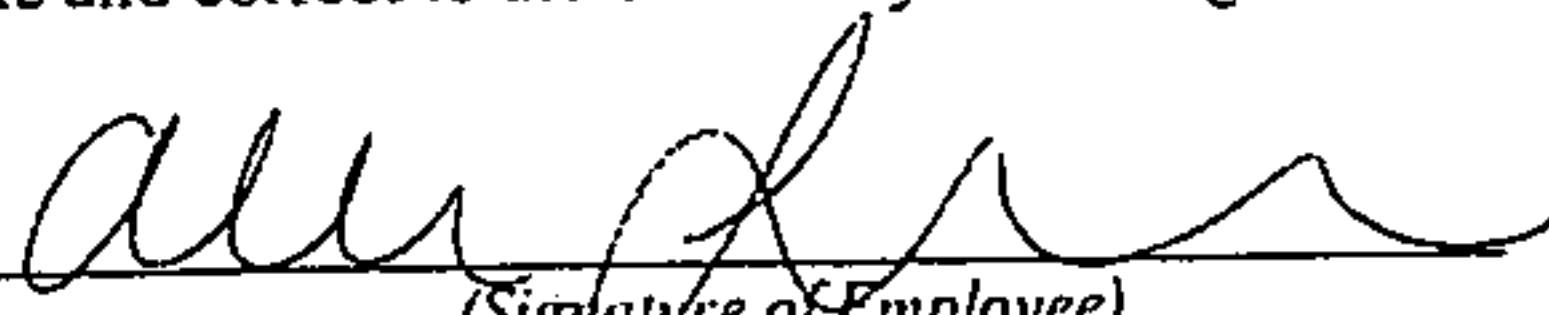
AL The trip is aimed at bringing together a bipartisan group of staff to discuss national security and foreign policy issues most relevant for today. The topics of discussion will span the organization of national security entities, especially DOD, and how these agencies work with one another. *plus perhaps include return of interagency relationship which is relevant for this trip's focus on foreign policy in the US government.*

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/14/17  
(Date)

  
(Signature of Employee)

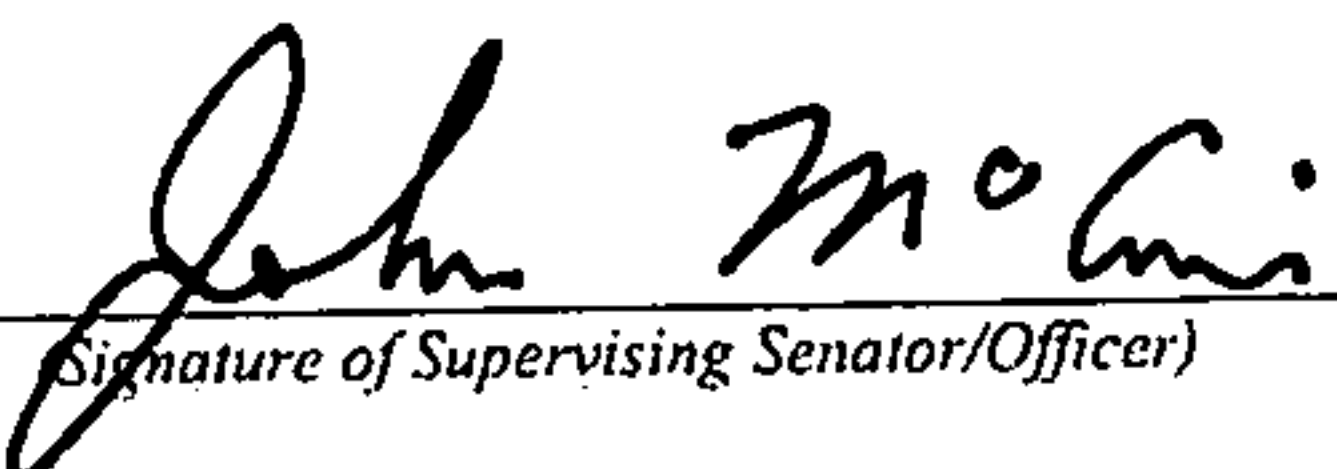
TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, McCain hereby authorize Allison Lazarus  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/14/17  
(Date)

  
(Signature of Supervising Senator/Officer)



## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):  
Partnership for a Secure America
2. Description of the trip: Congressional staff weekend of foreign policy and national security lectures.
3. Dates of travel: October 21-22, 2017
4. Place of travel: Airlie Conference Center, Warrenton, VA
5. Name and title of Senate invitees: See Attached List
6. I certify that the trip fits one of the following categories:  
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
OR  
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
AND  
☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
AND  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).



**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**

I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment of the trip.*

**OR**

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment of the trip (see questions 6 and 10).*

**- OR -**

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) is solely responsible for the planning and for conducting this trip.

\_\_\_\_\_

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring

together staff from both parties to build cross-party relationships and discuss diverse perspectives on

pressing issues in the national security and foreign policy arena.

Briefly describe each sponsor's prior history of sponsoring congressional trips:

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

**This will be the seventeenth such trip of this nature.**

\_\_\_\_\_

[illegible]



15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics. These statements are generally available to the public.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	\$35 (Coach Bus)	\$90 (For One Night)	\$77 (for 2 days)	\$191 conference services (over 2 days). This includes cost of breakout room, AV equipment, and incident snacks/refreshments.

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

It is close to Washington, DC, but also provides a remote setting that will encourage participants to step outside their daily roles as Senate staff.

19. Name and location of hotel or other lodging facility:

Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington, DC for a one night trip. The lodging and conference location is all the same.



21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meals and lodging are below the per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

**Participants will be transported by a coach class bus.**

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

**Signature of Travel Sponsor:**

Name and Title: Nathan Sermonis, Executive Director

Name of Organization: Partnership for a Secure America

Address: 1629 K Street NW, Suite 450, Washington, DC 20006

Telephone Number: (202) 293-8580

Fax Number: N/A

E-mail Address: [sermonis@psaonline.org](mailto:sermonis@psaonline.org)





**Saturday, October 21<sup>st</sup>**

1:30 pm	Depart from Union Station, Washington, DC
3:00 – 4:00 pm	Arrive at Airlie Conference Center & Check-in
4:00 – 5:00 pm	Material Review and Preparation
5:00 – 5:30 pm	Opening Remarks and Review of Agenda: Nathan Sermonis, PSA
5:30 – 7:00 pm	Airlie House – Meadow Room <b>Guest Speakers:</b> Luke Murry, National Security Advisor for House Majority Leader, Rep. Kevin McCarthy & Michael Kuiken, National Security Advisor for Senate Minority Leader, Sen. Chuck Schumer <b>Topic:</b> Bipartisan Panel – Mechanics of a Bipartisan Deal - Countering America’s Adversaries Through Sanctions Act
7:00 – 7:30 pm	Federal Room Pre-Dinner Reception Informal conversations with guest speakers
7:30 – 9:00 pm	Federal Room Keynote Dinner <b>Guest Speaker:</b> Michael Morell, Former Deputy Director of the CIA <b>Topic:</b> Global Challenges for Today and Tomorrow
9:00 – 10:00 pm	Federal Room After-Dinner Reception Informal conversations with guest speakers





### Airlie House – Meadow Room







PARTNERSHIP FOR  
A SECURE AMERICA

## Congressional Partnership Program Retreat Fall 2017

## National Security Council Simulation

**National Security Advisor:** Mr. Robert Sheldon,  
Director for Policy – Emerging Threats at the  
Business Executives for National Security

**2:00 – 3:30 pm**

**\*Group A\***

## Airlie – Audubon Room

**Guest Speaker:** Ambassador Roger Noriega,  
former Assistant Secretary of State for Western  
Hemisphere Affairs and former U.S. Ambassador  
to the Organization of American States

**Topic: Venezuela and U.S. Policy Options**

3:30 – 5:00 pm

**\*Group A\***

## Airlie – Audubon Room

**Guest Speaker:** Ambassador Barbara Bodine,  
former U.S. Ambassador to Yemen

**Topic:** Yemen and the Arabian Peninsula

**5:00 – 5:30 pm**

## Airlie House – Meadow Room

## Wrap-up and Departure from Airlie







*All invited congressional staff members handle foreign policy and national security topics in their professional office capacity.*

**Sen. Joe Manchin**  
**(D-WV)**



## **Lazarus, Allison (Armed Services)**

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**From:** PSA Congressional Program <cpp@psaonline.org>  
**Sent:** Thursday, September 7, 2017 12:48 PM  
**To:** Lazarus, Allison (Armed Services)  
**Subject:** Invitation for PSA's Fall 2017 Congressional Partnership Program

Allison,

I'm sorry you weren't able to participate in our Spring session but hopefully these dates work better!

Best,  
Jessica

Dear Allison,

It is our pleasure to inform you that you have been accepted to join the Fall 2017 schedule of Partnership for a Secure America's Congressional Partnership Program (CPP). The session will begin on **Monday, September 18, 2017** with an orientation at a Capitol Hill location TBD from 7:00 to 8:30 pm.

***Please review the following events schedule and let us know if you have any conflicts.*** In order to fully benefit from the program, it is important that you participate in the majority of the activities - especially the weekend retreat at the Airlie Conference Center October 21-22.

Note that you will have to submit ethics forms to attend the retreat. Please confirm with your office to ensure this is acceptable under your travel policy. If it is not, please let me know.

- SEPTEMBER 18 - Begin Program with Orientation
- *SEPTEMBER 21 COB - Ethics Forms DUE for retreat*
- OCTOBER 2 - Strategic Communications/Negotiation Evening Session (only required to attend one)
- OCTOBER 3 - Strategic Communications/Negotiation Evening Session (only required to attend one)
- OCTOBER 21 - 22 - Weekend Retreat at Airlie Conference Center in Warrenton, VA
- NOVEMBER 13 - DC Dinner 1
- NOVEMBER 28 - DC Dinner 2
- DECEMBER 11 - Final DC Dinner

**Please reply back to this email to confirm your participation.** If you have any questions, email us at [cpp@psaonline.org](mailto:cpp@psaonline.org) or call [202-293-8580](tel:202-293-8580).

Congratulations! We look forward to your participation in PSA's Congressional Partnership Program.

Very best,  
Jessica Harrington